

**Van Lunen Fellow 2010  
Applied Project**

**Strategic Planning Process for St. Timothy's Lutheran School**

**San Jose, California**

St. Timothy's is in the process of rebuilding after a sudden and unexpected leadership change that caused a steep decline in enrollment several years ago. St. Timothy's has been working to repair its reputation, rebuild its enrollment, and ultimately change the climate and culture of our school. It became apparent that in order to fully recover and begin to truly rebuild, St. Timothy's needed to strategically plan for the future.

To begin the strategic planning process, St. Timothy's needed to step back and reevaluate its core strengths and weaknesses. The school board of St. Timothy's reexamined and reaffirmed the school mission statement. A core values document was developed and the first ever strategic plan was developed and adopted for St. Timothy's Lutheran School. The school board has committed to annually review the strategic plan in an effort to continue the rebuilding and reshaping of St. Timothy's Lutheran School.

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## PROJECT FOCUS

St. Timothy's Lutheran School has, over its 30 year history, been able to move forward and grow simply by doing "more of the same." Following a sudden and unexpected leadership change 4 years ago, it became apparent that by continuing to do the status quo, the school would eventually close. St. Timothy's had long enjoyed an excellent reputation in the community. However, the changes at the administrative level significantly damaged our reputation and caused a steep decline in enrollment. The school board was slow to respond to the changes, and by the time they acted, it was almost too late. The board was not a cohesive group and went into "battle" mode reacting to every small situation. Long term planning decisions were made by looking to the past and reacting to internal & external influences (such as enrollment changes, the economy, or changes in leadership), rather than being proactive through a long term strategic plan.

Three years ago, the board came together as a unified board, but lacked vision and focus. It continued to operate in a reactionary mode. By continuing to look at the past, the board was ineffective in moving forward in a meaningful way. The school board identified four main areas to focus on in an effort to rebuild the school: resource development, improving community and church perception of St. Timothy's Lutheran School, increasing enrollment in the elementary school, and teacher recruitment and retention. Each of these 4 areas was a large undertaking in its own right, and all equally important to the main goal of rebuilding St. Timothy's. The board was unable to see past the enormity of the task at hand to be able to strategically plan for the future. Consequently, it was still unable to move forward.

It was at this point in the process that I was accepted to and began the Van Lunen Fellowship program. I came back from the first session realizing that in order for St. Timothy's to move to the next level, we needed to go back to the basics. We needed to define who we were as a school so that we could begin look forward rather than back in order to plan for the future. The board recognized that it needed to change its focus and begin to look at the big picture, leaving the day to day issues to the administrative staff.

Together the school board and I embarked on this year long project, which focused on four major tasks:

1. Reviewing the current Mission statement
2. Conducting a SWOT analysis
3. Developing Core Values
4. Developing a Strategic Plan

## **PROJECT PROCESS**

### **Learning Period (July 2009)**

During my time at the first session of my Van Lunen Fellowship year, I gained knowledge on the importance of understanding who you are as a school. How core values and a mission statement should be used as a guide to focus everything you do as a school, from the school board to the school staff. I spent much of my free time synthesizing the information and networking with the Van Lunen faculty and other fellows.

### **Planning Period (August 2009)**

After my return, I met with the school board president and senior pastor to share what I learned and what I envisioned as the next steps we needed to take. With the pastor's support, the board president and I formulated the process with which we would move forward, the steps we needed to take and how we would accomplish each step. We also determined that in order for this process to be successful the school board's operating procedure would need to be changed. The board had been very involved in the day to day administration of the school, and it was time to transition the board into policy based governance. Our first order of business was to plan a school board retreat.

### **Project Launch**

#### **School Board Retreat (September 2009)**

At our school board retreat, the agenda included:

- Review of St. Timothy's Mission and Vision Statements
- Review of SWOT analysis from Spring 2009
- Presentation on role of core values
- Presentation about strategic planning processes
- Presentation on board roles and responsibilities
- Development of major monthly topics for 2009-2010 board meetings

At the end of the board retreat, the school board was energized and refocused on planning for St. Timothy's future. The St. Timothy's Mission and Vision statements were reaffirmed and the SWOT analysis was reviewed and refined. The board brainstormed an initial list of possible core values and I was tasked with developing a core values document for St. Timothy's. A strategic planning discussion led to a list of possible main goals, a strategic planning subcommittee was formed and tasked with developing a strategic plan. Following the

discussion on board roles and responsibilities, the board agreed to reorganize the monthly agenda to focus on the newly developed major monthly topics rather than the individual team reports.

#### **Staff Input (October 2009)**

A series of staff meetings were held to gain input on the SWOT analysis and core values. Staff input led to refinement of both the SWOT analysis and list of core values.

#### **Parent Input (November 2009)**

A parent survey was developed and distributed gaining input on our core values.

#### **Core Values**

- List of core values (**Christ Centered, Nurturing, High Academics, Quality Teaching Staff**) was adopted in December 2009
- Final Core Value document with descriptions and supporting Bible verses were developed. The document was adopted and published in May 2010.

A series of monthly essays was developed revolving around our core values. A short essay on each core value was published in the church monthly newsletter, sent home to parents in our weekly envelopes, and posted on our website for the broader community.

#### **SWOT analysis**

- After including input from staff, the school board reviewed/refined the SWOT analysis
- The school board prioritized the top 5 items in each quadrant in January 2010

#### **Strategic Plan**

- Using the prioritized SWOT analysis and core values, the strategic planning committee identified the main priorities (**Program, Faculty and Staff, Marketing, Resource Development, and Facilities**) for the Strategic Plan (March 2010)
- Goal statements were written for the strategic plan and each major priority (April 2010)
- Initiatives were developed for each of the 5 priorities (May 2010)
- Strategic Plan was adopted by school board (June 2010)
- The School Board has committed to adding the action steps at the next board retreat in September 2010.

### **PROJECT RESULTS**

- Reaffirmed Mission and Vision Statement
- Core Values document
- A strategic plan with goal statements, priorities and initiatives.

### **ANALYSIS AND COMMENTARY**

My initial challenge was to guide the school board into a more policy based governance model. This also took a step of courage on my part to take full responsibility for all administrative issues. It also took some time and effort to retrain the board to funnel its energies toward policy rather than administrative issues. Reorganizing the agenda for each board meeting putting the major monthly topic first and team reports last was an effective way to change the focus of the meetings. An unexpected benefit to this change was that board meetings went from 4+ hours to 2-2.5 hours per meeting.

Another challenge was engaging the members of the strategic planning committee (a subcommittee of the school board) to fully commit to the task at hand. Once the process was started, mission statement reviewed and reaffirmed, core values written, and SWOT analysis completed, the strategic planning committee finally started to gel as a group and began to accomplish each task. We all felt such victory when the board adopted the strategic plan at the June 2010 meeting.

Thank you to all the faculty of the Van Lunen Fellowship Program for giving me the resources and knowledge to start this project. Thank you also to my Van Lunen consultant, Kiki Johnson, for guidance and support throughout the process. We will start next year with a renewed focus, a good understanding of who we are as a school, and a long term strategic plan. God has had His hand on this process and will continue to bless St. Timothy's Lutheran School.